DRS
Department of Retirement Systems

Plan 3 Investment Program Transfer Form

- Use this form to transfer all or part of your account balance from the WSIB Investment Program to the Self-Directed Investment Program or from the Self-Directed Investment Program to the WSIB Investment Program.
- Please refer to the information on the reverse side of this form.
- Print legibly in blue or black ink.
- Note: You can also initiate transfers between investment programs by calling 1-888-711-8773.

Return to:
ICMA RETIREMENT CORPORATION
P.O. Box 96220
Washington, DC 20090-6220
Toll Free: 1-888-711-8773
Fax: 202-962-4601

1 Plan Information
This Information must be completed

Please select one:

- ❑ Plan Name: SERS
  Self Plan Number: 107384
  WSIB Plan Number: 107383
- ❑ Plan Name: TRS
  Self Plan Number: 109513
  WSIB Plan Number: 109492
- ❑ Plan Name: PERS
  Self Plan Number: 107182
  WSIB Plan Number: 107181

2 Member Information
This information must be completed

Social Security Number ___ ___ ___ - ___ ___ - ___ ___ ___ ___

Daytime Phone Number (___ ___ ___) ___ ___ ___ - ___ ___ ___ ___
Area Code

Full Name ____
Last First M.I.

Street Address ____

City ______________________ State ______ Zip Code ______________

3 Transfer Information from WSIB to Self-Directed

From WSIB Investment Program to Self-Directed Investment Program

❑ 100 percent of my account OR $ ________________________
specific dollar amount

Note: For important information regarding the allocation and timing of your transfer refer to the reverse side of this form.

4 Transfer Information from Self-Directed to WSIB

From Self-Directed Investment Program to WSIB Investment Program

From:

$ or %	Fund Name	Fund Code

A list of funds and codes can be found on the back of this form. Please select from the funds noted within the plan.

5 Authorized Signature

I acknowledge that I read the instructions for the Plan 3 Investment Program Transfer Form (on the reverse side of this form), and I have received and reviewed the *Plan 3 Investment Guide* information. Sign, date and return this form to:
ICMA Retirement Corporation, P.O. Box 96220, Washington, DC 20090-6220.

____
Member Signature Date

1st • ICMA-RC Copy 2nd • Employee Copy

Plan 3 Investment Program Transfers

Indicate from which investment program the balances should be moved. You may use this form to transfer specific dollar amounts or 100 percent from the WSIB Investment Program to the Self-Directed Investment Program or specific dollar amounts or whole percentages from the Self-Directed Investment Program to the WSIB Investment Program.

From WSIB Investment Program to Self-Directed Investment Program:

Transfers from the WSIB Investment Program to the Self-Directed Investment Program will be processed out of your WSIB account as part of the month-end process during the month following your request. ***The assets will be reinvested in the Self-Directed Investment Program on the second business day of the month following the month your request was processed.** The transferred assets will be invested according to the most recent allocation on file. If ICMA-RC does not have an allocation on file, your assets will be invested in the Money Market Fund. To establish an allocation, call 1-888-711-8773, visit the Web site at www.icmarc.org/plan3, or complete a Plan 3 Investment Allocation Form. A confirmation will be mailed to you when the transaction is complete.

From Self-Directed Investment Program to WSIB Investment Program:

Please indicate the funds within the Self-Directed Investment Program from which you are transferring money into the WSIB Investment Program. Once this amount is transferred to the WSIB Investment Program, your funds will be invested first in the Short-Term Investment Fund (STIF) account and then moved into the Total Allocation Portfolio (TAP) after the monthly valuation process. A confirmation will be mailed to you when the transaction is complete. If your transfer from the Self-Directed Investment Program to the WSIB Investment Program is received by 1:00 p.m. Pacific Time on a business day, it will be posted at that day's closing price, or if the day the transfer is requested is not a business day then it will be at the closing price the next business day.

SERS Self-Directed Funds	Code
Money Market Fund	A6
Washington State Bond Fund	A4
Socially Responsible Balanced Fund	IH
U.S. Large Stock Index Fund	A2
U.S. Stock Market Index Fund	A1
U.S. Small Stock Index Fund	A3
International Stock Index Fund	KD
Short-Horizon	S1
Mid-Horizon	S2
Long-Horizon	S3

TRS Self-Directed Funds	Code
Money Market Fund	66
Washington State Bond Fund	T6
Socially Responsible Balanced Fund	IL
U.S. Large Stock Index Fund	62
U.S. Stock Market Index Fund	61
U.S. Small Stock Index Fund	63
International Stock Index Fund	LD
Short-Horizon	T1
Mid-Horizon	T2
Long-Horizon	T3

PERS Self-Directed Funds	Code
Money Market Fund	B6
Washington State Bond Fund	B4
Socially Responsible Balanced Fund	ID
U.S. Large Stock Index Fund	B2
U.S. Stock Market Index Fund	B1
U.S. Small Stock Index Fund	B3
International Stock Index Fund	JD
Short-Horizon	U1
Mid-Horizon	U2
Long-Horizon	U3

This form requests that you provide your Social Security Number, 5 U.S.C. Section 552(A) requires that the Department make the following disclosure when requesting that information:

- 26 U.S.C. Sections 6047(D), 6041(A), and 6109(A)(3) authorize DRS to solicit your Social Security Number.
- DRS uses your Social Security Number to ensure that any amounts disbursed under your account are properly reported to the Internal Revenue Service and as a reference number for tracking all data with regard to your retirement account.
- Routinely, DRS uses the Social Security Number as the identifying number for the member file.
- If you do not provide your Social Security Number, DRS cannot guarantee that the information you are providing on this form will be properly matched with your member records. This is a particular risk if your name is a fairly common one. Failure to provide your Social Security Number may also result in misreporting to the Internal Revenue Service of any disbursements you receive, which may result in adverse tax consequences for you.
- Because DRS uses your Social Security Number in order to report disbursements to the IRS as required under federal law, the disclosure of your Social Security Number is mandatory.